CLIENT TRACK:
BASIC OVERVIEW OF THE CLIENT DATA REPORTING SYSTEM

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TRAINING OVERVIEW

- System Overview
- Data Collection and Reporting
- Authorized Users
- Community Partnerships and Confidentiality

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WHAT IS CLIENT TRACK?

- In 2009, Client Track was purchased from Data Systems International (DSI) by IHCDA to serve as the CSBG data collection system
- Client Track is the statewide database that will be used to track clients served by each community action agency (CAA)
- The system will produce an unduplicated count of clients served across each agency's programs
- The system can generate each agency's annual CSBG IS report beginning 2013
- The system can be used as a comprehensive reporting tool to not only gauge the impact of CSBG dollars, but also other federal and non-federal funding streams

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WHO OWNS CLIENT TRACK?

•The data is stored on IHCDA's servers

•IHCDA owns the data that is being collected

•Oversight, maintenance, and compliance are administered by IHCDA

•Training and technical assistance are providing by Roeing

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WHO WILL USE CLIENT TRACK?

Client Track has three levels of users.

<u>State Users</u>
•IHCDA Program Managers, Specialists, Monitors, and Contractors (Roeing)
•will have access to all of the data and reporting in the system

<u>Agency Administrators</u>
•will oversee the agency implementation of the system
•will oversee daily usage of the system after implementation
•will conduct all state-required and agency-required reporting
•will have access to all agency data and reporting, including the front line staff, but no state level access

<u>Agency Front Line Staff</u>
•will enter all information obtained during the client eligibility review
•will serve as data entry specialists
•will have access to client intake data only

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HOW TO CHOOSE YOUR AGENCY ADMINISTRATORS?

Agency Administrators should be users that possess the following skill sets:

- be familiar with your agency's reporting requirements for various grants, especially CSBG.
- participate, in some capacity, with the CSBG IS reporting process
- should have familiarity with CSBG, ROMA Goals, and NPIs
- should be familiar with your agency's community partners, needs assessments, and current client intake processes across various programs
- Should have some familiarity with the agency's IT infrastructure, as it pertains to data collection and reporting

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HOW DOES CLIENT TRACK WORK?

1) Program and grant information are submitted to IHCDA with the annual Grantee Plan Packet

2) Each agency's program, grants, services, ROMA Goals, and NPIs are updated in the system

3) Clients will be entered and/or integrated into the system through RIAA, client intake, or other programs

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WHAT DATA IS CLIENT TRACK COLLECTING?

Client's Name
Social Security Number
Date of Birth
Marital Status
Race/Ethnicity
Education
Income and non-cash benefits
Housing status
Assessment of case management needs
Family members information

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HOW IS DATA INTEGRATED FROM OTHER PROGRAMS?

•Currently data is integrated from RIAA and IWAP

•RIAA is the database that is used for client eligibility with the Low Income Home Energy Assistance Program, or EAP

•IWAP is the database used for client eligibility with the Indiana Weatherization Assistance Program

•Integration from these two programs will prevent duplicate entries of many clients

•The data integration between RIAA/IWAP and Client Track was completed in January 2012

•Now, data from these two systems are integrated into Client Track nightly

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CLIENT INTAKE FORM

APPLICANT INFORMATION

Full Name: ______________________________
Last *First* *M.I.*

Address: ______________________________
Street Address *Apartment/Unit #*

____
City *State* *ZIP Code* *County*

Contact Phone ( ) ______________ Email Address: ______________

If cell number, please provide your carrier name: ______________

APPLICANT INFORMATION

Ethnicity Codes	Race Codes	Health Insurance Codes
A. Hispanic or Latino B. Not Hispanic or Latino	A. Black/African American B. White C. Asian D. Multi-Race E. Native Hawaiian/Other Pacific Island F. American Indian/Alaska Native G. Other/Don't Know H. Refused	A. Medicare B. Medicaid C. Hoosier Healthwise D. Medicaid Select E. Other Private Ins. F. None

Household Members First and Last Name	Date of Birth xx/xx/xxxx	Relationship to you (I.E. son, daughter, wife, etc.)	Social Security Number	Ethnicity Code	Race Code	Disabled Y/N	Veteran Y/N	Pregnant Y/N	Last Grade Completed	Health Insurance Code	Annual Income
1.		SELF									
2.											
3.											
4.											
5.											
6.											
7.											
8.											

1. **Where do you currently reside?**
   _____ Own Home _____ Rent Unsubsidized _____ Rent Subsidized (HUD, SECT 8, HCVP, Shelter Plus Care, Public Housing, if your rent is based on your income)
   _____ Homeless _____ Living with Friends/Family _____ At Risk of Eviction/Foreclosure
   _____ Don't Know _____ Other (Please Specify: ______________________________)

2. **Please mark all types of income you receive.**
   _____ TANF _____ Food Stamps (SNAP) _____ Medicaid _____ Medicare _____ Wages
   _____ Child Support _____ Interest/ Dividends _____ Unemployment _____ SS/SSI/SSDI _____ Disability
   _____ Self-Employment _____ Pension/Retirement _____ Interest/Dividends _____ Other (Please specify:______________)

3. **What is your marital status?**
   _____ Single _____ Widowed _____ Divorced _____ Living Together _____ Married & Living w/Spouse
   _____ Civil Union _____ Living Together _____ Other _____ Refused _____ Married & Not Living w/Spouse

4. **Have you received utility assistance in the past 12 months?** ___ Yes ___ No *Form required by Indiana Housing*

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WHEN WILL CLIENT TRACK BE INTEGRATED INTO OTHER DATABASES?

- Based on the process for implementing the software, Client Track is not scheduled to be integrated with other databases at this time

- In some instances, using Client Track may require duplicate entry of client data in multiple programs

WHO SETS UP THE PROGRAM INFORMATION?

IHCDA will set up the initial program information

This information includes each agency's:

- Programs
- Grants funding the programs
- Services offered by the program

IHCDA is the only authorized user allowed to update this information

If agencies find that their programs, grants, and/or services are incorrect, the agencies must submit changes to IHCDA's CSBG and EAP Program Manager or Program Specialist.

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HOW IS THE CLIENT'S INFORMATION PROTECTED?

•Client Track is an "open system", or all agencies with authorized users have access to the clients' information

•Currently, there are six universal data elements that will be shared with all users:

- Name, DOB, SSN, marital status, race, and ethnicity
- All other information may be restricted from public view

•There is an option to "restrict to organization"

•By restricting information to the organization, only that agency's authorized users will have access to the clients' information

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LOGGING IN ONLINE

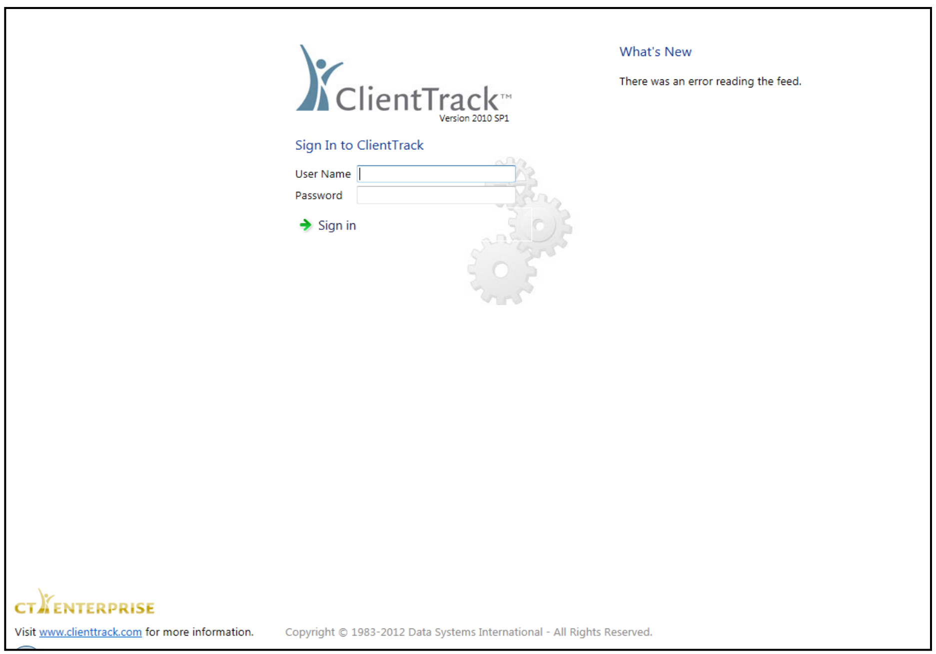
To log into Client Track, the user should visit http://ihcdaonline.com and click on Client Track.

LOGGING IN ONLINE

Then, the user will be prompted to log into the Client Track Database.

Each user is given a unique username and password.

If a user does not have this information, then that user should contact the agency's administrator.



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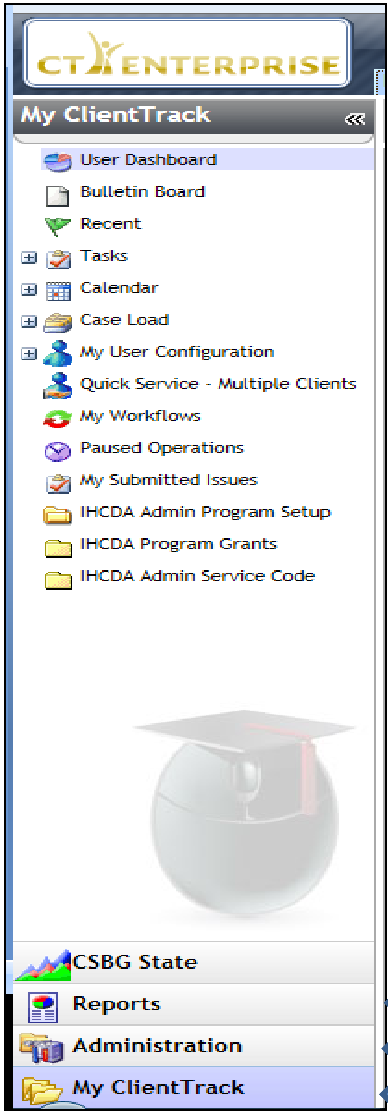
CLIENT TRACK SETUP



Here is where reports are run and submitted.

Only agency administrators will have access to this link.

My Client Track is the Home Page once all users log in.

My Client Track

Once a user logs in, My Client Track is that user's homepage.

If the user is in another section of the system, the user can return to the homepage by clicking on My Client Track

My Client Track can used to track each staff person's:

- Tasks, appointments, and follow-ups
- Post messages and notes about client's accounts
- Caseloads and workflows, or teams if the user is a supervisor
- Update user information

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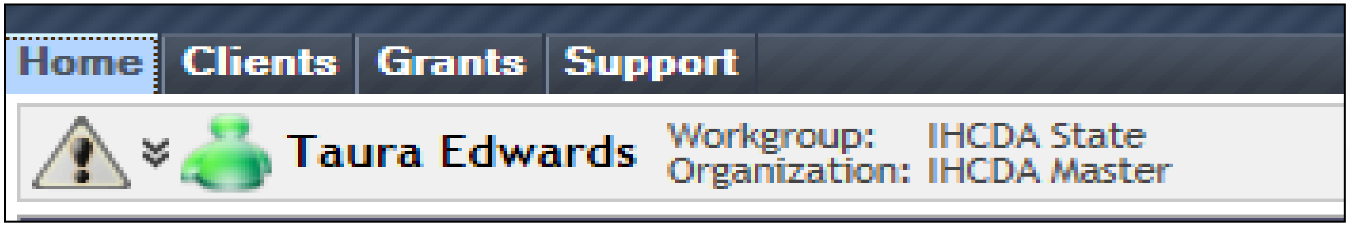
TOOLBAR ON MY CLIENT TRACK



Home	Clients	Grants
If a user clicks on My Client Track or logged in for the first time, HOME is the user's home page.	This tab allows the user to complete the CSBG Intake Workflow or update a client's information.	This tab allows the user to review any CSBG grant and program information. It is only used by administrators.

Workgroup: Identifies the user's access to database (User, Administrator, or State)

Organization: Identifies the organization that the user is linked to

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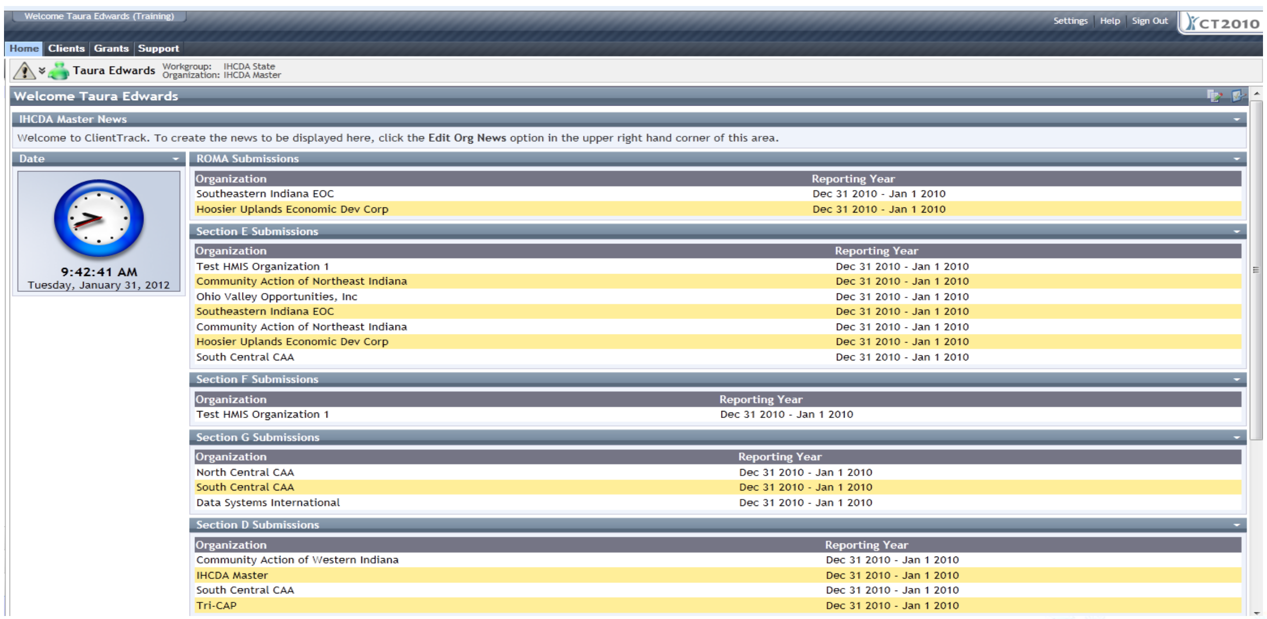
CLIENT TRACK DASHBOARD

- The User Dashboard is the home page of Client Track.

- It provides the user with the following information:
  - Organization that the user is linked to
  - CSBG IS report submissions
  - Current Program Enrollments



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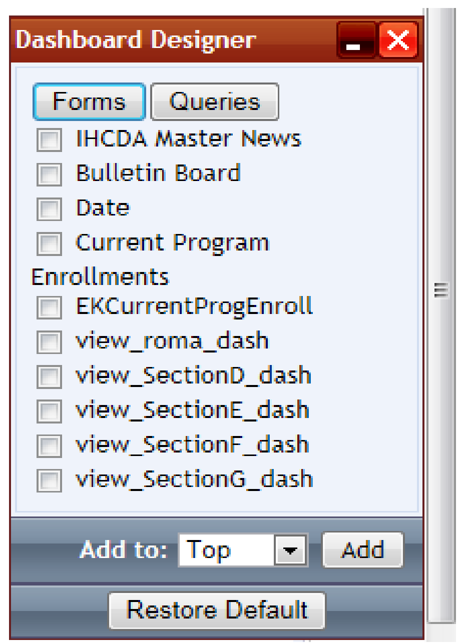
HOW DO YOU CHANGE THE DASHBOARD?

Click on the double tablet in the mid-right corner of the screen and a box will appear.

A pop up box will appear. The user can choose what Information is displayed on the dashboard.



This option is restricted to administrators only.

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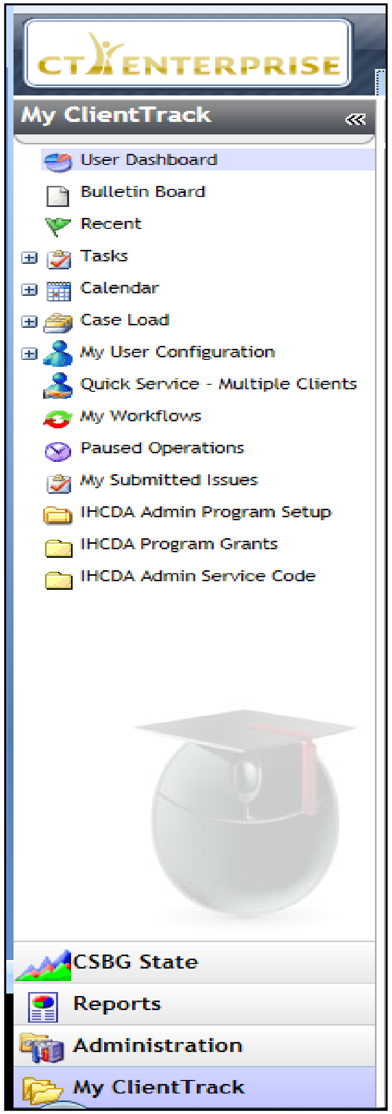
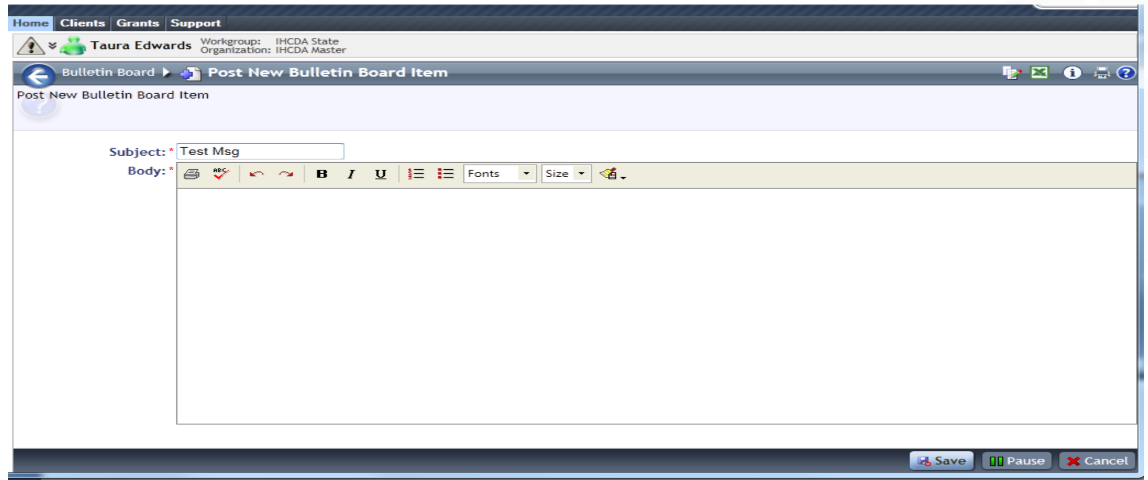


BULLETIN BOARD

It allows users to save electronic messages about clients, cases, or other information. These messages are not shared with other users.



- To Post a Message, click on Post New Message.
- A note pad will appear.
- Enter the subject and body.
- Click on Save, and the message will post.

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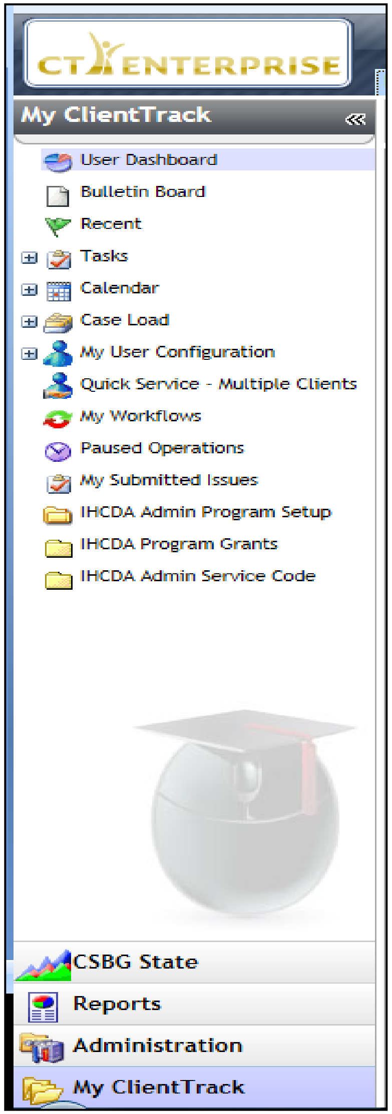
RECENT

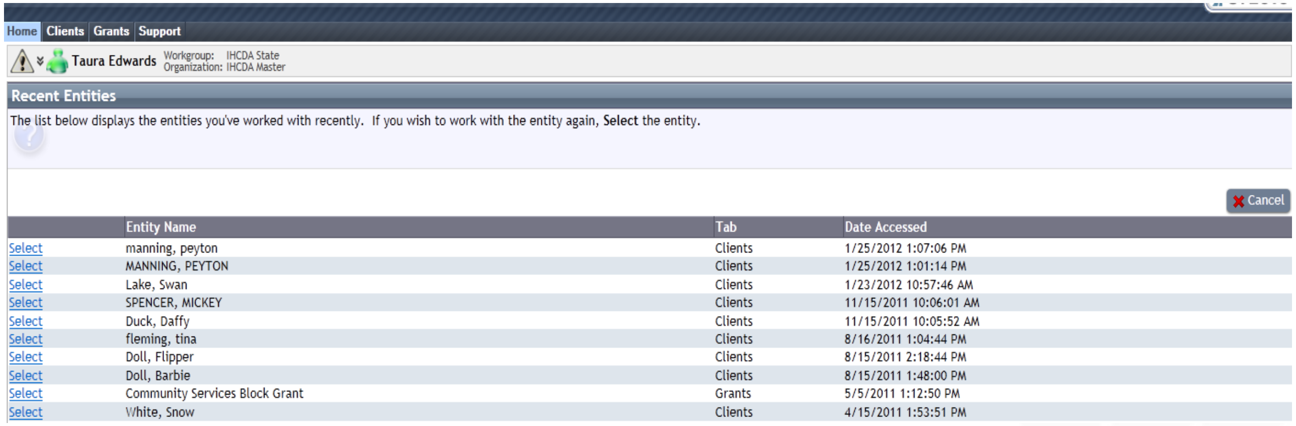


•The Recent tab keeps track of the most recently visits clients or grant information that the user has visited.

•It is a quick link to review recently information without doing a long search.

•This tab will give the client's name, tab visited (Client or Grant), and date accessed.

•The user can quickly go back to this link by clicking Select.



	Entity Name	Tab	Date Accessed
Select	manning, peyton	Clients	1/25/2012 1:07:06 PM
Select	MANNING, PEYTON	Clients	1/25/2012 1:01:14 PM
Select	Lake, Swan	Clients	1/23/2012 10:57:46 AM
Select	SPENCER, MICKEY	Clients	11/15/2011 10:06:01 AM
Select	Duck, Daffy	Clients	11/15/2011 10:05:52 AM
Select	fleming, tina	Clients	8/16/2011 1:04:44 PM
Select	Doll, Flipper	Clients	8/15/2011 2:18:44 PM
Select	Doll, Barbie	Clients	8/15/2011 1:48:00 PM
Select	Community Services Block Grant	Grants	5/5/2011 1:12:50 PM
Select	White, Snow	Clients	4/15/2011 1:53:51 PM

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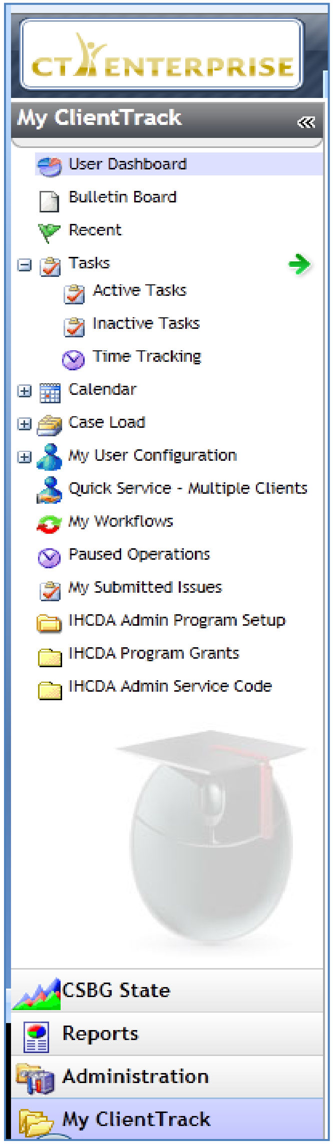

TASKS

•Tasks are items that are scheduled on the Calendar.

•Each task identifies:

- Type-Task, Goal, Activity, or Alert
- Name
- Begin/End Date
- Participant Type-Client, User, Provider, or Other
- Role-Participant, Presenter, or Provider
- Status-New/Pending, Acknowledged, Completed, or Cancelled

•This information determines how the task will appear on the user's calendar.

•There are 3 types of tasks:

- **Active Tasks-** New/pending, Acknowledged
- **Inactive Tasks-** Completed or cancelled
- **Time Tracking-** Tracks the time that the user spend trying to complete the task.

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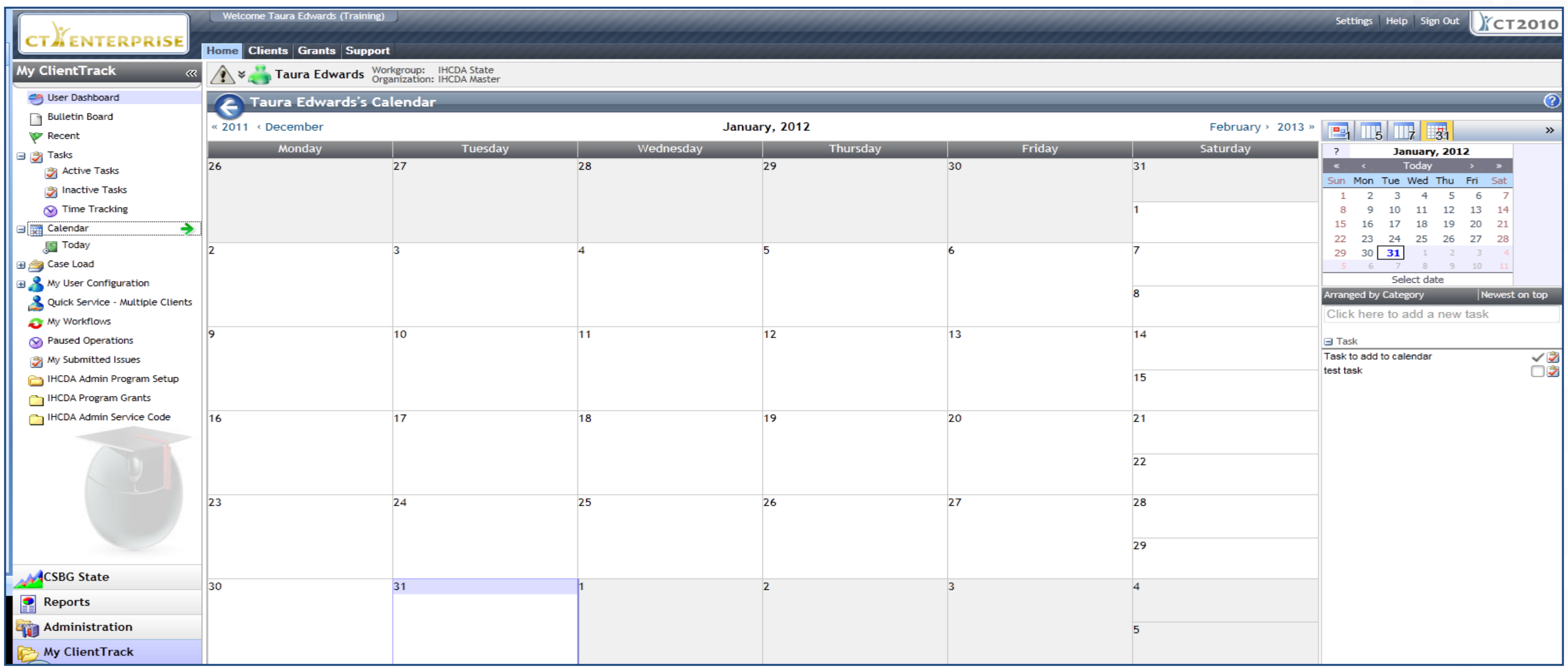
CALENDAR

- The Calendar tracks all of the tasks, follow-ups, and appointments set by the user.
- The calendar can be viewed by day, 5-day week, 7-day week, or monthly views.



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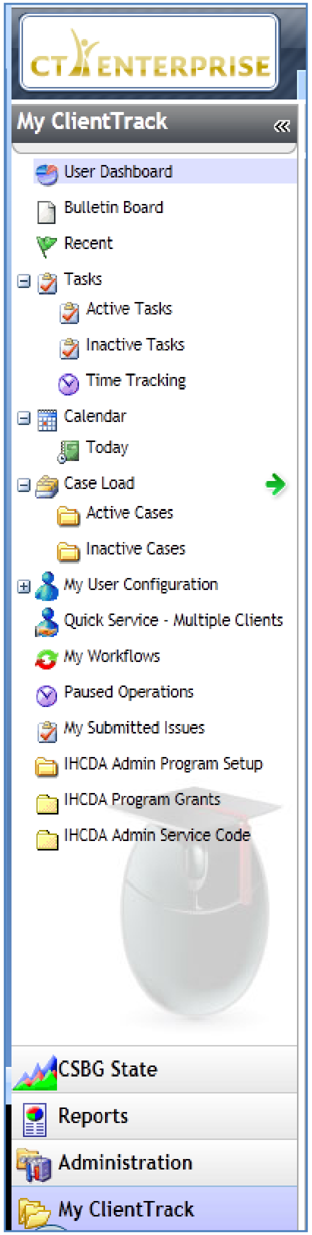
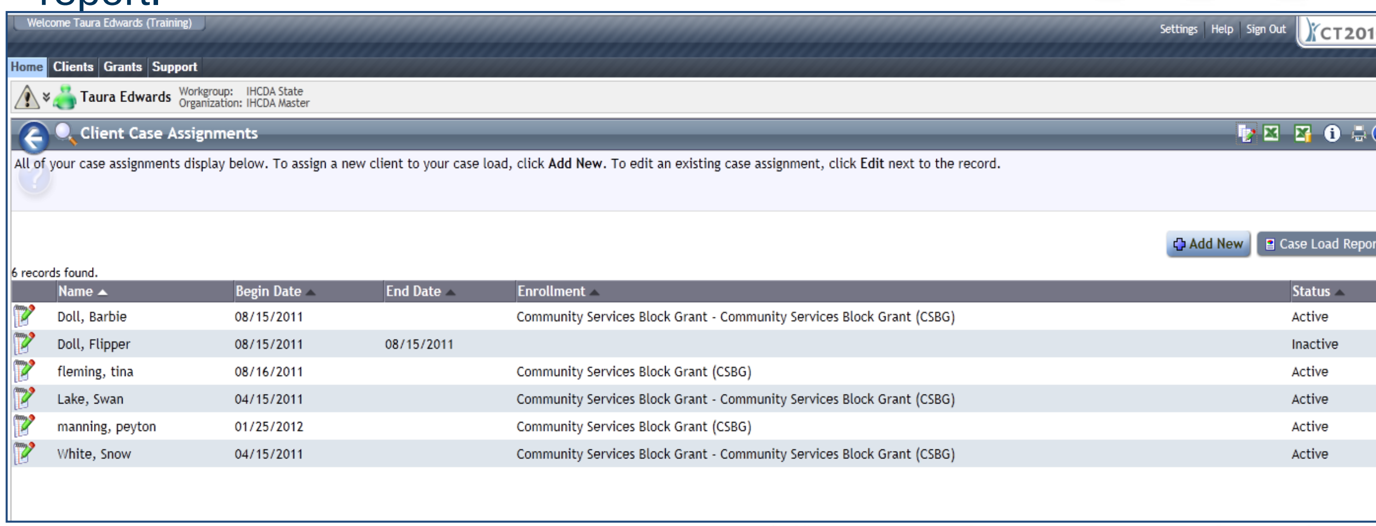


CASELOAD

- The caseload tracks the clients that have been assigned to the case manager.
- It provides a quick link to update the client's information.
- It separates the caseload by status (active or inactive).
- It lists the program that the client is enrolled in and the begin/end date of case management.
- It allows the case manager to add a new client or print a caseload report.



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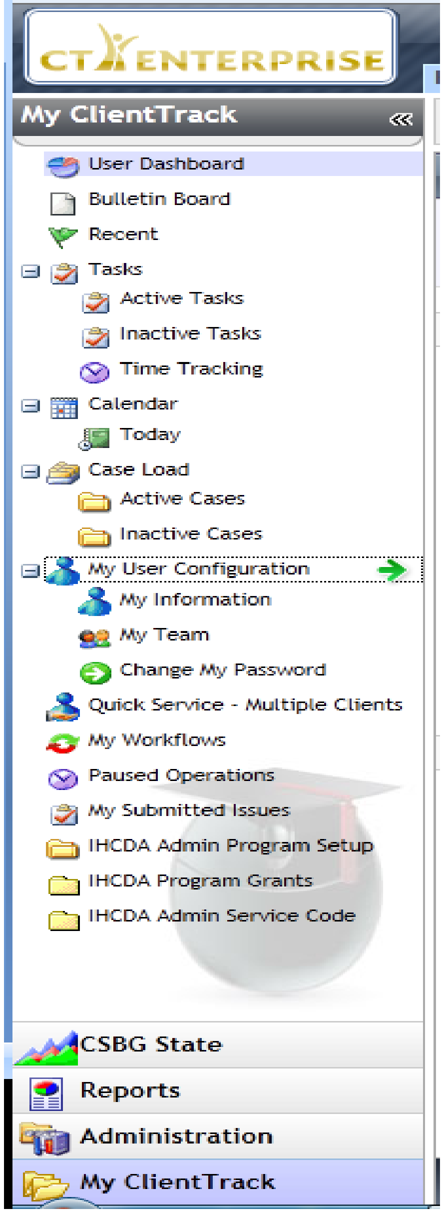

MY USER CONFIGURATION

This Section allows users to:

- Update their contact information in the database
- Manage their team (if listed as a supervisor)
- Change passwords

First, IHCDA must set up the user with a username and password.

If that user is an administrator (or supervisor), the agency must notify to list that user as a supervisor.

IHCDA will then link that administrator's team (or staff) in Client Track.

The agency administrator will have access to update the team's passwords and contact info.

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WHO PROVIDES TECHNICAL SUPPORT?

Client Track has a four step process for technical support.

Step 1: The user will contact the agency's administrator for basic issues or password resets. If the agency administrator is unable to complete the request, then…

Step 2: The request is sent to IHCDA's Program Management Staff. IHCDA will acknowledge the request and assign to a staff person. If IHCDA is unable to resolve the request, then…

Step 3: The request is sent to Roeing. Roeing will troubleshoot the issue with the agency. If Roeing is unable to resolve the request, then…

Step 4: The request is sent to Data Systems International (DSI), or the creators of the system. DSI will provide final resolution.

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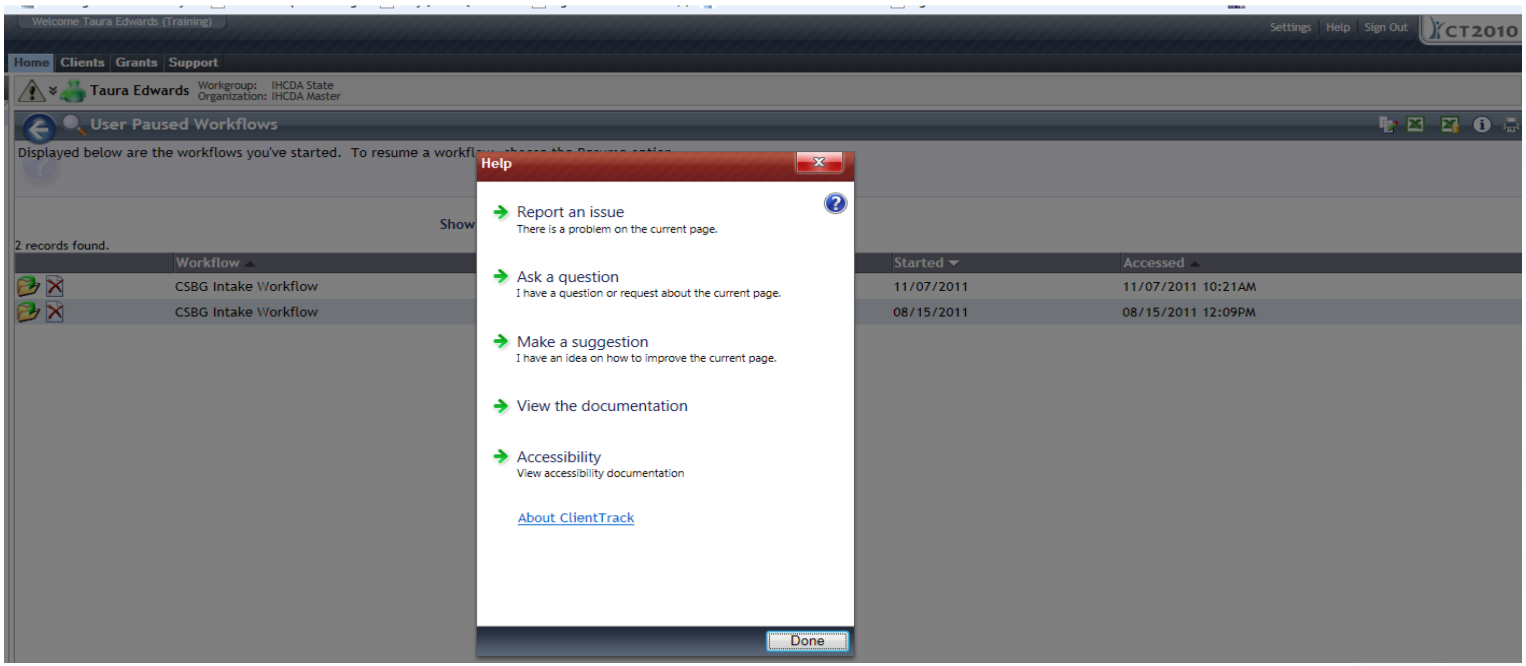
HOW DO I ACCESS TECHNICAL SUPPORT?

- In the top right corner of the screen, there is a HELP Link.
- Click on that Help link, and a box will pop up.
- Click on Report an Issue.



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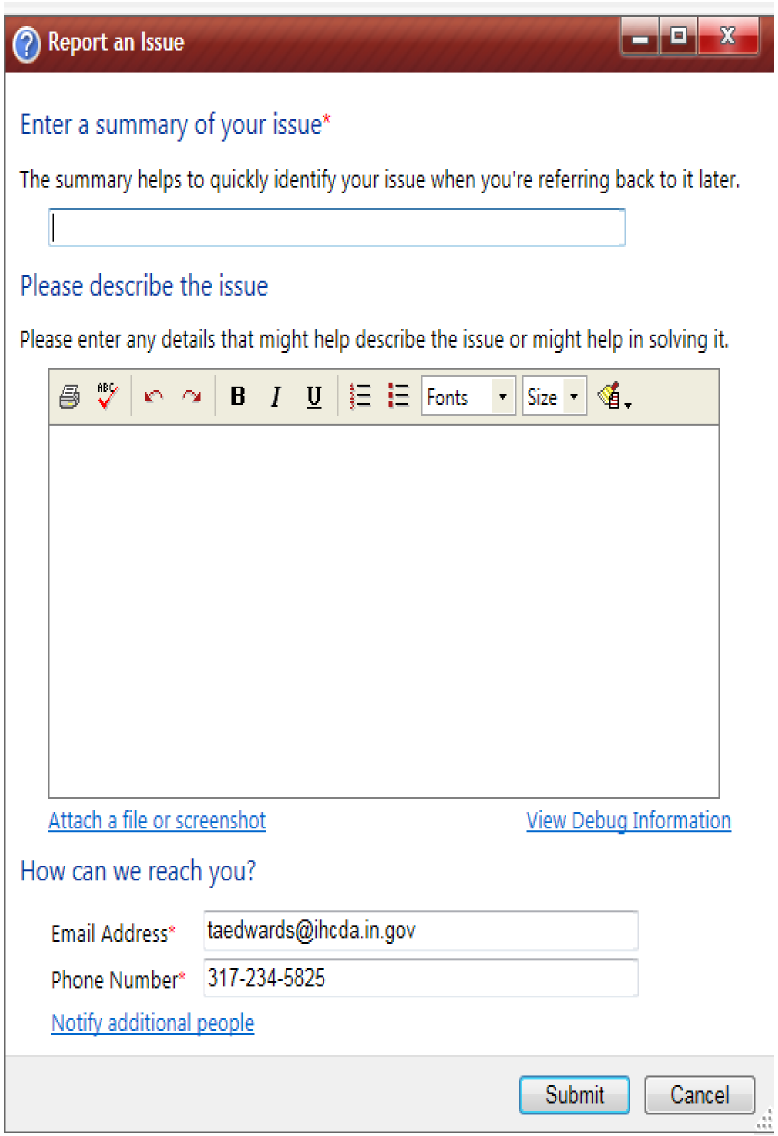

SUBMITTING THE ISSUE

Once the user has clicked on Report an Issue, a form will appear.

Step 1: Provide a summary of the issue

Step 2: Enter details about the issue in the text box

Step 3: Attach a file or screenshot if necessary

Step 4: Ensure that the user's contact info is correct.

Step 5: Click on Submit.

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STILL HAVE QUESTIONS ABOUT THIS INFORMATION?

Contact Taura Edwards, CSBG and EAP Program Manager, for more information. You can reach her at (317) 234-5825 or via email at taedwards@ihcda.in.gov .

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